

MARKET ACCESS

With the city of Pittsburgh in the center, southwestern Pennsylvania is a strategic location for any business. Situated in the western portion of the northeastern quadrant of the United States, it is unparalleled in this access to both consumer and supplier markets.

ASSETS WITHIN A DAY'S DRIVE OR 500-MILE/806-KILOMETER RADIUS

Industrial and Commercial Markets

- 63% of the national industrial output
- 36 of the top 55 countries in the U.S., rated by value added by their manufacturing enterprises

Population and Buying Power

- More than 53% of the U.S. buying income
- 25 metropolitan areas each exceeding 1 million people
- More than 120 million people in metro markets
- 45% of the U.S. population
- 45% of the total Canadian population

Retail Markets

- More than 50% of total U.S. retail sales
- 28 of the top metropolitan retail markets in the U.S.
- 39 metropolitan markets exceeding \$5 billion in sales

Southwestern Pennsylvania is a major transportation hub of the northeast U.S. direct service for passengers and commodities connect the region to national and international markets via air, highway, rail and water. Together the four comprise a complete transportation network.

STRATEGIC TRANSPORTATION FACTS

- Pittsburgh International Airport (PIT) offers daily non-stop services to more than 50 cities.
- Based on 2002 data from the U.S. Army Corps of Engineers, Pittsburgh is the second busiest inland port in the nation and the 13th busiest port, of any kind, in the nation. Pittsburgh is larger in tonnage than Baltimore, Philadelphia or St. Louis. The 52 million tons of cargo the Port of Pittsburgh ships and received equates to an annual benefits to the region of more than \$873 million.
- Pittsburgh is within six hours driving distance from Baltimore, Buffalo, Cleveland, Cincinnati, Columbus, Detroit, New York City, Philadelphia, Toronto and Washington, D.C.
- The region's road network consists of several limited access highways, including Interstates 70, 76 (the Pennsylvania Turnpike), 79 and 80. Interstate 68 is just a few miles south in West Virginia and Maryland.
- Several new limited access roads are under construction, including the Mon-Fayette Expressway and the Southern Beltway, which will improve access to all points south and Pittsburgh International Airport.
- CSX, Norfolk Southern and Wheeling & Lake Erie railroads have main lines serving southwestern Pennsylvania. Intermodal shipping agreements permit seamless coast to coast rail service.
- More than 200 air and surface freight companies call southwestern Pennsylvania home.
- Southwestern Pennsylvania houses a major break bulk parcel handling facility of the U.S. Postal Service.
- A \$10 million intermodal transloading facility recently opened new New Stanton in Westmoreland County. The Westmoreland Rail Freight Terminal is in close proximity to major highways and interconnects with three major railroad, CSX, Norfolk Southern and Canadian National. It offers excellent access to the Westmoreland Distribution Center.

PITTSBURGH REGION LABOR STATS

Country/Area	2003 Population	Labor Force **	Employed **	Unemployed **	Rate of Unemployment	Per Capita Personal Income (\$) ***	Number of Business ****
United States	290,89,777	147,483,000	139,480,000	8,003,000	5.4	30,906	12,826,568
Pennsylvania	12,365,455	6,270,122	5,958,073	312,049	5.0	31,116	503,406
10-County Region	2,633,190	1,325,444	1,260,469	64,975	4.2	31,576	108,791
Pittsburgh MSA*	2,410,330	1,197,459	1,139,394	58,065	4.8	32,381	97,702
Allegheny	1,261,303	671,632	642,310	29,322	4.4	36,500	55,157
Armstrong	71,659	32,410	30,456	1,954	6.0	24,929	2,465
Beaver	178,697	85,927	81,742	4,186	4.9	26,357	6,228
Butler	180,040	94,396	90,033	4,363	4.6	29,780	7,787
Fayette	146,121	60,215	55,495	4,720	7.8	23,988	5,123
Greene	40,398	16,762	15,814	948	5.7	21,234	1,273
Indiana	89,054	39,348	36,893	2,455	6.2	23,802	3,309
Lawrence	93,408	40,353	38,154	2,199	5.4	23,413	4,042
Washington	204,286	97,942	93,285	4,657	4.8	29,740	8,458
Westmoreland	368,224	186,458	176,287	10,171	5.5	28,635	14,921
City of Pittsburgh	325,337	158,084	152,131	5,953	3.8	N/A	14,747

Source:

* Pittsburgh MSA consists of Allegheny, Armstrong, Beaver, Butler, Fayette, Washington and Westmoreland counties, including the city of Pittsburgh.

** Labor data is for 9/04 and is not seasonally adjusted, Bureau of Labor statistics, U.S. Census Bureau.

*** Per capita income is for 2002, Bureau of Economic Analysis.

**** Business data by Dun & Bradstreet, 12/04.

Last updated December 2, 2004.

IF YOU EARN THIS MUCH IN THE PITTSBURGH REGION YOU WOULD NEED TO EARN THE FOLLOWING PERCENTAGE TO HAVE COMPARABLE BUYER POWER IN THESE METROPOLITAN AREAS

Pittsburgh Region	\$10,712	\$24,000	\$48,000	\$72,000	\$108,000	Average
Atlanta, GA	100.0	99.7	100.0	101.3	101.7	100.5
Austin, TX	100.0	96.6	97.8	99.9	100.6	99.0
Baltimore, MD	101.4	106.7	105.2	104.7	104.5	104.5
Buffalo, NY	101.3	105.5	105.0	104.6	104.4	104.1
Charlotte, NC	100.0	100.4	100.5	101.9	102.2	101.1
Chicago, IL	101.0	107.8	108.4	108.6	108.3	106.8
Cincinnati, OH	100.0	102.1	101.4	101.6	101.8	101.4
Cleveland, OH	100.5	104.1	103.6	102.9	102.6	102.7
Denver, CO	101.2	107.6	106.8	106.8	106.8	105.9
Indianapolis, IN	100.0	101.3	101.0	101.3	101.4	101.0
Kansas City, MO	100.0	102.4	101.6	101.2	101.3	101.3
Miami, FL	100.3	100.8	102.1	103.9	104.3	102.3
Milwaukee, WI	100.8	106.5	105.8	105.3	105.0	104.7
Minneapolis, MN	101.6	107.2	107.2	106.2	105.5	105.5
Phoenix, AZ	100.0	101.7	101.9	103.1	103.4	102.0
Portland, OR	134.0	104.8	104.4	103.9	103.6	110.1
Raleigh, NC	100.0	102.2	101.8	102.5	102.7	101.8
San Diego, CA	131.1	110.7	109.9	109.4	109.0	114.0
Seattle, WA	136.1	114.0	111.6	110.2	109.6	116.3
St. Louis, MO	100.0	101.1	101.8	102.1	102.2	101.4
Tampa, FL	100.0	94.5	96.3	99.1	99.8	97.9
Suburban Washington D.C.	103.2	106.7	106.1	106.1	106.0	105.6
District of Columbia	119.4	112.3	110.0	109.0	108.7	111.9

Source: Economic Research Institute, Geographic Assessor, October 2002

Last Updated November 6, 2003

Founded in 1984, the Pittsburgh Cultural Trust is a nonprofit organization created to stimulate the economic and cultural development of Pittsburgh through the creating and promotion of a downtown arts and entertainment district. The Trust owns and operates the Benedum, Byham, Harris and O'Reilly Theaters in Downtown Pittsburgh, and encourages and presents diverse performing and visual arts programs in the Cultural District. The Cultural Trust has almost completely transformed Pittsburgh's Downtown to a vibrant animated area with over fourteen cultural facilities, public parks and plazas, and new and proposed commercial development. It accomplished this through streetscaping programs, façade development new cultural facilities, and public open spaces and art projects.

THEATERS IN DOWNTOWN PITTSBURGH		
Theater	Number of Seats	Type of Performance
Benedum Center	2,885	Ballet, Dance, Opera, Musicals
Byham Theater	1,349	Varied
CAPA Theater	400	Varied
CLO Cabaret Theater	253	Varied
Harris Theater	200	Films
Heinz Hall	2,800	Symphony
O'Reilly Theater	650	Plays
Wood Street Galleries	50	Varied

- **Benedum Center for the Performing Arts** – Opened in 1987, the Benedum Center was formerly the Stanley Theater. The faithful restoration of this theater reflects the glories of America's theatrical past. The 2,800-seat Benedum is home to the Pittsburgh Ballet Theatre, Pittsburgh CLO, Pittsburgh Opera and many special performances.
- **Byham Theater** – Originally opened as the Gaiety Theater in 1904, the 1,300-seat Byham Theater is Pittsburgh's only remaining vaudeville house. Patrons enjoy theater, dance and musical performances..
- **CLO Cabaret Theater** – The Theater Square complex, which opened in November 2004, is home to Pittsburgh's first live Cabaret Theater. As the newest stage in the Cultural District, the Cabaret at Theater Square is programmed year-round by the Pittsburgh CLO.
- **CAPA Theater** – The district is home to the Pittsburgh High School for Creative and Performing Arts (CAPA), which has its own theater that opened in September 2003.
- **The Harris Theater** – Renovated in 1995, the Harris Theater is now the Downtown home for the Pittsburgh Filmmakers. This 200-seat theater is also used for small live performances. The theater was named in tribute to Pittsburgh John P. Harris, the creator of the Nickelodeon.
- **Heinz Hall** – Heinz Hall for the Performing Arts, dedicated in 1971 and renovated in 1995, is the cornerstone of the Cultural District of Pittsburgh. This cultural-entertainment focal point of the Golden Triangle has helped spur the continuing economic and cultural revitalization of downtown Pittsburgh. Owned and operated by the Pittsburgh Symphony Orchestra, the hall hosts hundreds of performances by the PSO, Broadway, and other guests each year.
- **The O'Reilly Theater** – Ground was broken in 1997 for the new home of the Pittsburgh Public Theater and when it opened in December 1999, the O'Reilly became the newest venue for performing arts in the Pittsburgh region. The theater was designed by renowned architect Michael Graves.
- **Wood Street Galleries** – The Pittsburgh Cultural Trust operates Wood Street Galleries, which features multi-disciplinary artists from all over the world. Wood Street Galleries also houses the Trust's shared office space program which provides a home for several small arts organizations.

The Pittsburgh Cultural Trust, the Pittsburgh Symphony and Clear Channel Entertainment, present the Pittsburgh Broadway Series, a seven-show series featuring the best the theatrical world has to offer. With performances in the Benedum Center, the Byham Theater and Heinz Hall, the Broadway Series presents blockbuster hits including "Phantom of the Opera," "Miss Saigon" and "Beauty and the Beast."

Crime Rate

The Pittsburgh region has long had one of the lowest crime rates in the country. In fact, it is among the lowest of the 25 largest metropolitan areas.

CRIME INDEX (RATE PER 100,000 INHABITANTS)		
Metropolitan Area	Violent Crime	Property Crime
Pittsburgh, PA	359.5	2,407.8
Atlanta, GA	51.25	4,319.9
Baltimore, MD	883.0	3,818.0
Cincinnati, OH	383.2	4,134.6
Denver, CO	390.5	4,367.3
Indianapolis, IN	548.3	3,937.7
Miami, FL	813.1	5,030.1
Milwaukee, WI	416.5	3,921.7
Minneapolis, MN	327.4	3,452.7
Phoenix, AZ	506.5	5,852.6
Portland, OR	361.0	4,960.1
Raleigh, NC	369.2	3,522.1
San Diego, CA	476.9	3,290.1
Seattle, WA	409.7	5,048.7
St. Louis, MO	475.7	3,901.5
Tampa, FL	863.8	4,908.1
Washington, DC	487.1	3,375.2

Source: FBI Uniform Crime Reports, 2003
Last Updated December 7, 2004

Attractions

The Pittsburgh region is blessed with a wide array of cultural and entertainment attractions. From sports, to museums, to amusement parks, the Pittsburgh region has something to suit every taste.

TOP PAID ATTRACTIONS			
Institution	Description	Web Site	Attendance
Pittsburgh Pirates	Major League Baseball	www.pittsburghpirates.com	1,583,031
Kennywood	Traditional Amusement Park	www.kennywood.com	1,400,000
Gateway Clipper Fleet	Cruises on Monongahela, Allegheny and Ohio Rivers	www.gatewayclipper.com	800,000
Pittsburgh Zoo & PPG Aquarium	Zoo and Aquarium	www.Zoo.pgh.pa.us/	740,000
Carnegie Science Center	Science and Technology Museum	www.carnegiesciencecenter.org	618,800
Idewild and Soak Zone	Traditional and Water Amusement Park	www.idewild.com	500,000
Pittsburgh Penguins	NHL Hockey Team	www.pittsburghpenguins.com	486,961
Pittsburgh Steelers	NFL Football Team	www.pittsburghsteelers.com	477,584
Pittsburgh Panthers Football	University of Pittsburgh Athletic Team	www.pittsburghpanthers.com	355,183
Sandcastle Waterpark	Water and Entertainment Park	www.sandcastlewaterpark.com	350,000
Heinz Regional History Center	Center of Western Pennsylvania History	www.pghhistory.org	292,559
Pittsburgh Symphony	Symphony	www.pittsburghsymphony.org	273,746
Carnegie Museums of Art & Natural History	Art, History and Cultural Museum	www.carnegiemuseums.org/cmnh	246,400
Pittsburgh Panthers Basketball	University of Pittsburgh Athletic Team	www.pittsburghpanthers.com	202,177
Frick Art & Historical Center	Fine and Decorative Art Museum	www.frickart.org/home	180,792
Washington Wild Things	Frontier Baseball League Team	www.washingtonwildthings.com	156,276
Fallingwater	Nature Inspired Home Designed by Frank Lloyd Wright	www.wpconline.org/fallingwaterhome.htm	140,015
National Aviary	Aviary	www.aviary.org	110,212
Pittsburgh Children's Museum	Children's Museum	www.pittsburghkids.org	104,672
Fort Necessity National Battlefield	Historical & Educational Park	www.nps.gov/fone	93,649

Source: Pittsburgh Regional Alliance
Last Updated December 22, 2004

Higher Education

One of the region's top industries in terms of attracting outside investment is higher education. Able to offer challenging programs with an emphasis on practical application, Carnegie Mellon University, the University of Pittsburgh and Duquesne University attract students from around the globe.

Southwestern Pennsylvania is blessed with 34 colleges and universities and more than 140,000 students seeking higher education.

COLLEGES AND UNIVERSITIES IN THE PITTSBURGH REGION – 2003 ENROLLMENT							
College or University	Total Enrolled	Full Time	Part Time	Associate*	Bachelor's*	Master's*	Ph.D.*
Art Institute of Pittsburgh	3,465	2,098	1,307	438	139	0	0
Butler County Community College	3,731	1,904	1,827	361	0	0	0
California University of Pennsylvania	6,438	5,191	1,247	24	958	346	0
Carlow College	2,137	1,162	975	0	381	95	0
Carnegie Mellon University	9,756	8,271	1,485	0	1,245	1,338	164
Chatham College	1,256	727	534	0	118	160	12
Community College of Allegheny County	19,103	7,847	11,256	1,374	0	0	0
Community College of Beaver County	2,533	1,269	1,264	354	0	0	0
DeVry University**	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Duquesne University	9,701	7,880	1,821	0	1,060	871	74
Geneva College	2,163	1,839	324	10	454	105	0
Grove City College	2,314	2,279	35	0	486	0	0
Indiana University of Pennsylvania	13,868	1,991	1,877	13	1,907	493	72
LaRoche College	1,771	1,280	491	0	321	84	0
Penn State University – Beaver	740	646	94	20	27	0	0
Penn State University – Fayette	1,156	869	287	106	66	0	0
Penn State University – McKeesport	826	749	77	9	56	0	0
Penn State University – New Kensington	1084	784	300	60	69	0	0
Pittsburgh Theological Seminary	379	282	97	0	0	6	20
Point Park University	3,183	2,188	995	5	514	175	0
Reformed Presbyterian Seminary	76	25	51	0	0	1	0
Robert Morris University	4,816	2,750	2,066	13	738	335	13
St. Vincent College	1,508	1,285	223	0	235	0	0
St. Vincent Seminary	81	69	12	0	0	8	0
Seton Hill University	1,712	1,041	671	0	215	113	0
Slippery Rock University	7,799	6,747	1,052	0	1,190	196	0
Trinity Episcopal School for Ministry	309	184	125	0	0	10	0
University of Phoenix (Pittsburgh campus) ***	364	0	364	0	2	0	0
University of Pittsburgh – Greensburg	1,920	1,711	209	0	214	0	0
University of Pittsburgh – Main	26,795	21,562	5,233	0	3,667	1,861	348
Washington and Jefferson College	1,233	1,219	14	0	266	0	0
Waynesburg College	1,887	1,298	589	12	335	135	0
Westminster College	1,590	1,391	199	0	286	43	0
Westmoreland County Community College	6,238	2,581	3,657	440	0	0	0
Total	141,932	101,119	40,758	3,236	14,979	6,376	703

* Degrees conferred, 2003

** Local campus opened in Fall 2003

*** Local campus opened in 2000

Source: PA Department of Education
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